



**100 Rogers Street  
Bluefield, West Virginia 24701**

## **REQUEST FOR PROPOSALS (RFP)**

### **ASSET MANAGEMENT SOFTWARE**

The Sanitary Board of Bluefield (SBB) is soliciting sealed proposals from qualified vendors to provide Asset Management software to manage asset and work management processes for our existing operations. This software needs to directly interface with existing customer information systems management software from Continental Utility Solutions, Inc. (CUSI), as well as an existing ESRI ArcGIS Enterprise SDE and Portal environment with associated workflows. Modules for service request management, work order management, asset management, and dashboard reporting through ArcGIS Portal are required.

Sealed proposals are due by **4:00 pm, October 15, 2020**. Three (3) hard copies of the response shall be included. All proposals should be clearly marked “**Asset Management Software RFP**”. Proposals must address all the issues reflected in the attached requirements and include attached questionnaire and summary to be considered responsive.

Sealed proposals should be hand carried or delivered to the following address:

The Sanitary Board of Bluefield  
ATTN: Asset Management Software RFP  
100 Rogers Street or PO Box 998  
Bluefield, West Virginia 24701

The pricing data reflected in your proposal must be good through **December 31, 2020**.

The Board reserves the right to accept or reject any or all proposals received as a result of this request for proposals or to negotiate with any qualified offer, or to cancel in part or in its entirety this request for proposals if it is in the Board’s best interest to do so.

This solicitation is not a commitment by SBB to award a contract or to pay for any costs incurred in the preparation of your proposal or to procure or contract for any goods or services.

Your proposal must be signed by an official of your company authorized to commit to and enter into a formal contract for goods and services.

SBB does not discriminate on the basis of race, color, national origin, sex, religion, age or disability in employment or in the provision of goods and services.

1.0 SPECIAL INSTRUCTIONS TO BIDDERS

1.1 *Purpose of RFP*

This request solicits proposals to furnish the Sanitary Board of Bluefield, Bluefield, WV, hereinafter referred to as “SBB”, with an asset management software system. Specifications and technical requirements of this software package can be found in Section 4 of this document.

1.2 *Background Sanitary Board of Bluefield*

SBB, provides sanitary sewer serves for Bluefield, WV, Bluefield, VA and Brushfork, WV. We operate two (2) wastewater treatment plants, with 19 pump stations and 350 miles of gravity sewer line to provide services for approximately 8,000 residential and commercial customers.

SBB has two Treatment Plants. Westside Treatment Plant located at 203 Parsley Street Bluefield Va and Ada Treatment Plant located at Rt 112 Bluefield WV. Westside Treatment Plant is designed to treat 8.3 million gallons of sewer a day, and the Ada Treatment Plant is designed to treat 1.2 million gallons of sewer a day.

We strive to provide our customers with high quality, cost effective sanitary sewer services by collecting and treating all wastewater within our service area and in accordance with applicable Local, State, and Federal permit requirements.

1.3 *General Background Information*

SBB currently utilizes several separate applications to track and manage various operational responsibilities, including job costing, work tracking, service life, consequence of failure, treatment facility efficiencies, office facilities and fleet vehicles. These applications have limited scheduling functionality and are restricted to filling out forms to collect data. We currently do not have the ability to run operation wide data analytics or reports for budget planning outside the individual applications.

SBB incorporated CUSI/UMS for tracking customer accounts and providing our customers with a web based portal for tracking their accounts and payments. We are now looking to mature this customer experience to include work requests and tracking functionality. Currently much of existing operations rely on manual or written reports to track and maintain records of the ongoing and historic work record. This outdated methodology does not lend itself to historical tracking and documentation and retrieval of the operational data.

We have identified the following issues:

- Determining the status of work is cumbersome
- Dispatching work is inefficient
- Follow-up work such as “dress work” can get overlooked
- Inventory of supplies used by work crews must be written to be tracked
- Data cannot easily recall and review this information for decision making
- Maintenance, for the most part, is reactive rather than proactive

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### 1.4 *Scope of the Proposed Project*

This RFP addresses all of the operational requirements for an asset management software system. This RFP does not include the hardware or operating system software that currently exists on-premise. In your proposal you should provide your recommendation for the hardware necessary to operate your software that is in accordance with the network environment outlined in Section 4 of this document.

Our new solution would incorporate asset and work management under one roof. Asset management tools would allow us to view historical maintenance records, assign work orders for all SBB assets and facilities, automate maintenance service orders, and run reports for risk management purposes. Work management tools would allow all field personnel to receive remote work orders assigned to them, with the ability to complete the work order or reassign to others in the field. Automate work order creation based on the previous work performed.

## 2.0 ADMINISTRATIVE AND CONTRACTUAL INFORMATION

### 2.1 *Inquiries*

All inquiries for information shall be directed to:

Stephen Duffy, Engineering Manager

E-mail: [sduffy@bluefieldsanitary.org](mailto:sduffy@bluefieldsanitary.org)

Phone: (304) 325-2050

### 2.2 *RFP Specifications*

This RFP is intended to describe SBB's requirements and provide a response format in sufficient detail to secure comparable proposals.

### 2.3 *Implied Requirements*

All products and services not specifically mentioned in this RFP, but which are necessary to provide the functional capabilities described by the vendor, must be included in the proposal.

### 2.4 *Vendor-Supplied Materials*

Any material submitted by a vendor shall become the property of SBB unless otherwise requested at the time of submission. Any material considered confidential in nature must be so marked.

### 2.5 *Vendor's Proposals*

Vendors must submit a sealed response to this RFP in writing. The vendor's proposal must follow the format provided in Section 4 of this document. Any

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proposals that do not follow the format outlined in this RFP will be deemed non-responsive. Each proposal must be submitted with three (3) copies.

### 2.6 *Economy of Preparation*

Proposals should be prepared simply and economically. They should provide a straight forward and concise description of the capabilities of the software proposed. Emphasis should be placed on clarity and content. All of the questions in the requirements sections of this RFP must be completed in their entirety.

### 2.7 *Conditions of Agreement*

SBB desires to contract with a single vendor for all asset management software, software maintenance, installation, conversion, and support. Implementation services must be performed by vendor, not a third party implementor. SBB will select the proposal that in its opinion is best suited to meet the defined requirements.

The successful vendor will be expected to enter into contract negotiations with SBB that will result in a final firm fixed price for the software and all associated support.

### 2.8 *Response Date*

Sealed proposals to be considered must arrive at the SBB Offices on or before close of business (4:00pm) October 15, 2020.

Proposals not received by the proposal closing time will be returned, after receipt, unopened to the vendor.

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3.0 RFP EVALUATION PROCESS

3.1 *Review of Proposals*

The review of submitted proposals will occur as soon as practical following date they are due. The review process will involve evaluating all proposals for completeness, conformity, clarity, and compliance to the RFP requirements. Proposals not meeting minimum requirements will be considered non-responsive and excluded from further consideration.

3.2 *Proposal Timeline*

<b>Date</b>	<b>Description</b>
Tuesday, September 15, 2020 .....	RFP advertise
Thursday, October 15, 2020 @ 4:00 pm .....	Deadline for submitted proposals
Monday, October 19, 2020 .....	Bidding Opening
Thursday, October 21, 2020.....	Sanitary Board Monthly Meeting
On or Before Friday, November 20, 2020.....	Notify vendors of Board Decision

3.3 *Vendor Selection*

The Sanitary Board of Bluefield Directors will select the most qualified solution based on the proposed cost and software capabilities.

4.0 REQUIREMENTS FOR THE PROPOSED ASSET MANAGEMENT SYSTEM

4.1 *Introduction*

SBB’s critical requirements for an asset management software system are reflected in detail in the questions outlined in **Appendix A**. Vendors must address these critical requirements in order to be considered. Vendors may propose additional features and options to be considered but only after fulfilling the critical requirements.

4.2 *General Requirements*

SBB currently uses a Microsoft SQL database to manage the CUSI/UMS customer account systems and PostgreSQL for the ArcGIS Enterprise deployment.

The Asset Management System is expected to provide the following functions:

- Service Request Management
- Work Order Management
- Asset Inventory Management
- Preventative Maintenance
- Risk Management
- Asset Inspection Reports
- Workflow Management

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- ESRI GIS Integration
- ArcGIS Online Reporting

### **ESRI Integration**

The asset and work management software should fully integrate with ArcGIS Enterprise Portal and ArcGIS SDE Server to allow live (real time) updates to work orders and service requests, and provide a means of dashboard reporting. Edits to GIS on ESRI products must be a live connection across all platforms and reflect changes immediately for preconfigured triggers that enable notifications for assigned tasks to be completed. The vendor must have 811 integration developed and supported by the vendor to receive, track, manage and report on 811 requests. The vendor shall be an ESRI Silver level business partner or higher.

### **Utility Billing Integration**

The asset and work management software should fully integrate with CUSI/UMS Utility Billing software. The software should allow personnel to view customer information on the map based on service or meter locations.

### **Asset and Work Management**

The software must utilize Windows Workflow Foundation, allowing users to build and deploy custom processes for spatial and non-spatial assets. AMS must consume ESRI server-published services as rest end points for interactive maps and work order tracking; must be able to customize menus and modify user interface to accommodate specific users without changing application code; must support on-premises deployment.

#### 4.3 *Scope of Work*

SBB desires a turnkey-style proposal. The vendor is expected to include pricing for the following tasks and deliverables:

- Install asset management software that meets the above requirements.
- Provide licenses, extensions, modules and install any needed web applications to meet the above requirements for listed users.
- Set up and integrate software with systems listed above.
- Configure inspection forms and reports.
- Train staff and consultant on asset management system use.

#### 4.4 *Hardware Requirements*

- Users will access the software from both Windows based workstations and IOS or Android mobile devices
- On-premise deployment with current version of Windows Server 2016, Microsoft SQL Server or PostgreSQL as required

4.5 *Vendor Information*

The proposal shall provide a brief description of their organization to include:

- Size of the organization
- ESRI Business Partner Level
- Number of clients currently using the proposed software
- Number of years in business providing similar applications
- Number of support personnel in the organization
- A client contact list containing the names and contact numbers of current users of the proposed package. Clients with a population of 10,000 – 20,000 and with similar configurations would be preferable.

4.6 *Vendor Implementation Team*

The proposal shall provide the following information specific to the implementation team:

- Names and Resumes of the vendor’s personnel who will be responsible for the actual implementation of this software. Key personnel to include the project manager or team leader will be required.
- An organizational chart of the project team including the name, role and office location of each team member

4.7 *Training*

Proposals must include all on-site training of end user and support personnel required for the implementation and use of the application and any proposed new systems software. Please describe the training that will be provided as part of the initial set-up as well as the per hour cost for training beyond the initial setup. Costs reflected for training shall include all travel and related expenses.

4.8 *Cost Detail and Summary*

The vendor must itemize all charges for software installation, on-site training, conversion, software customization, maintenance, licenses, application programs, and any other cost associated with the acquisition of the system.

Please provide a detailed cost breakdown and description of the annual fees and implementation fees for your solution (**Appendix B**); with first-year and subsequent-years costs. Include the following if applicable:

- Annual licensing fees
- Annual maintenance fees
- Implementation service fees
- Customization fees, including integration
  - Utility Billing

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- SCADA
- 811
- Financial, inventory

### 4.9 *Project Implementation*

The vendor must provide a project implementation plan describing customer responsibilities and vendor responsibilities. The project plan must describe all tasks associated with the implementation of the system, including a proposed timetable.

### 4.10 *Vendor Documents*

The vendor must provide a sample software license agreement, maintenance agreement, warranty terms and license fee with proposal, and provide upgrade procedures, support requirements and typical service level agreement timelines.

### 4.11 *Technical Environment*

SBB will run the software in a self-hosted server environment. The vendor must provide pricing options for self-hosted software environments. Cloud based services are not desired and will not be considered if submitted.

### 4.12 *User and Technical Documentation*

The selected vendor will provide the SBB with user and technical documents to include:

- A detailed user guide, both generic procedures and SBB implementation specific
- A detailed technical guide for administration

### 4.13 *Requirements Questionnaire*

Bidders must fill out the Key Requirements Questionnaire (**Appendix A**) and include it as part of their proposal. This questionnaire outlines the critical functions with the management process. Proposals will be evaluated based on the responses to this questionnaire. Failure to completely fill out this document will render your proposal non-responsive and it will no longer be considered.



## Appendix A

### Key Requirements Questionnaire

General Organizational Information	Response (indicate if additional information is attached)
What is the size of your organization? Where are you located?	
How long has your organization been in business?	
For how long has your organization been providing enterprise asset management services?	
Indicate your current ESRI Business Partner Level.	
Indicate the number of client organizations currently using the software.	
Indicate the number of clients with 10,000 – 20,000 in population.	
How is your organization set up to improve the efficiency of local government customers?	
Is a disaster recovery plan in place for your organization?	
Key Areas of Required Functionality	Response (indicate if additional information is attached)
GIS-Based Asset and Work Management (indicate as <b>SUPPORTED</b> or <b>NON-SUPPORTED</b> )	
Service Request Management (indicate as <b>SUPPORTED</b> or <b>NON-SUPPORTED</b> )	
Work Order Management (indicate as <b>SUPPORTED</b> or <b>NON-SUPPORTED</b> )	
Preventative Maintenance Program (indicate as <b>SUPPORTED</b> or <b>NON-SUPPORTED</b> )	
Management (indicate as <b>SUPPORTED</b> or <b>NON-SUPPORTED</b> )	

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Asset Inventory Management (indicate as <b>SUPPORTED</b> or <b>NON-SUPPORTED</b> )	
ArcGIS Enterprise Portal Integration & Reporting (indicate as <b>SUPPORTED</b> or <b>NON-SUPPORTED</b> )	
<b>Technology and GIS Functionality</b>	<b>Response</b> (indicate if additional information is attached)
Does your software provide an integrated GIS map viewer through the entire application? If so, indicate platform.	
Specify if proposing on-premises or cloud deployment model.	
If proposing on-premises deployment, indicate hardware requirements.	
List single sign-on technologies supported (e.g. MS Active Directory, LDAP, etc.).	
Describe the degree of integration with ESRI products.	
How does the solution integrate with ArcGIS Enterprise Portal and ArcGIS SDE Server?	
Will your system support integration with KY 811?	
Please describe your customer support model.	
What documentation will be provided with the solution?	
Is your code developed completely in-house? If not, who writes your code and where are they located?	
Are new features included in the initial pricing or will they cost extra?	
What is your QA and beta process?	
What is the release cycle for updates and fixes?	

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How many of your customers needed customizations to meet their requirements and what are the most common customizations?	
How often is maintenance performed? How are customers notified?	
What are your support SLAs for all tiers of service?	
How is user support offered?	
What was your average uptime during the past 12 months?	
Can you share your product documentation before we sign a contract?	
Can you set up a dedicated test instance before we sign a contract?	
Does the software track who and when system changes are made?	
What is your licensing model? Are their set limits to the amount of assets and/or the size and complexity of asset data?	
Can this documentation be augmented with SBB specific procedures? If there is additional cost to do so, please specify.	
<b>Asset Management</b>	<b>Response</b> (indicate if additional information is attached)
Does the system have the ability to create service requests both in an office environment and remotely? Mobile apps?	
Does the system support associating service requests with work orders?	
Does the system include management tracking/reporting of service requests and work orders using dashboards?	
Does the system support the ability to conduct routine detailed inspection of inventory components?	
Does the system support the ability to recognize and identify high risk areas in the distribution system?	

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Does the system provide the ability to create a work orders from a service request?	
Does the system support the ability to assign work orders to an outside contractor?	
Does the system support tracking and updating work order status of an outside contractor?	
Does the system provide the ability to track asset activities and history for unlimited years (e.g. repairs, replacement, maintenance, upgrades, retirement, abandon-in-place, etc.)?	
Does the system provide the ability to group assets within a category and area in GIS format to help schedule and coordinate preventive maintenance activities for the distribution system?	
Does the system support integration of WV & VA 811 calls/emails to create service requests?	
Preventive maintenance including scheduling proactive asset inventory reservations, procedure checklists or attachments, etc.	
Does the system provide the ability to allow for customer visibility of service request status and resolution?	
Does the system support escalation workflow approval processes for emergency and priority requests?	
Does the system support generating work orders without association with specific assets?	

## Appendix B

### Proposal Price Summary

**Annual Asset Management Software Fees**

	\$
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**Annual Maintenance & Support Fees**

	\$
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**Implementation Service Fees**

	\$
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**First Year Total**

**(without Integrations) \$**

**Subsequent Years Total \$**

**Integration Fees**

Utility Billing	\$
Customer One-call	\$
SCADA	\$
811 One-call	\$
Sage Intacct Inventory	\$

**First Year Total (with Integrations) \$**

**Subsequent Years Total \$**

Firm: \_\_\_\_\_ Printed Name: \_\_\_\_\_

Address: \_\_\_\_\_ Signature: \_\_\_\_\_

Phone: \_\_\_\_\_ Date: \_\_\_\_\_